Orders - SKY Energy

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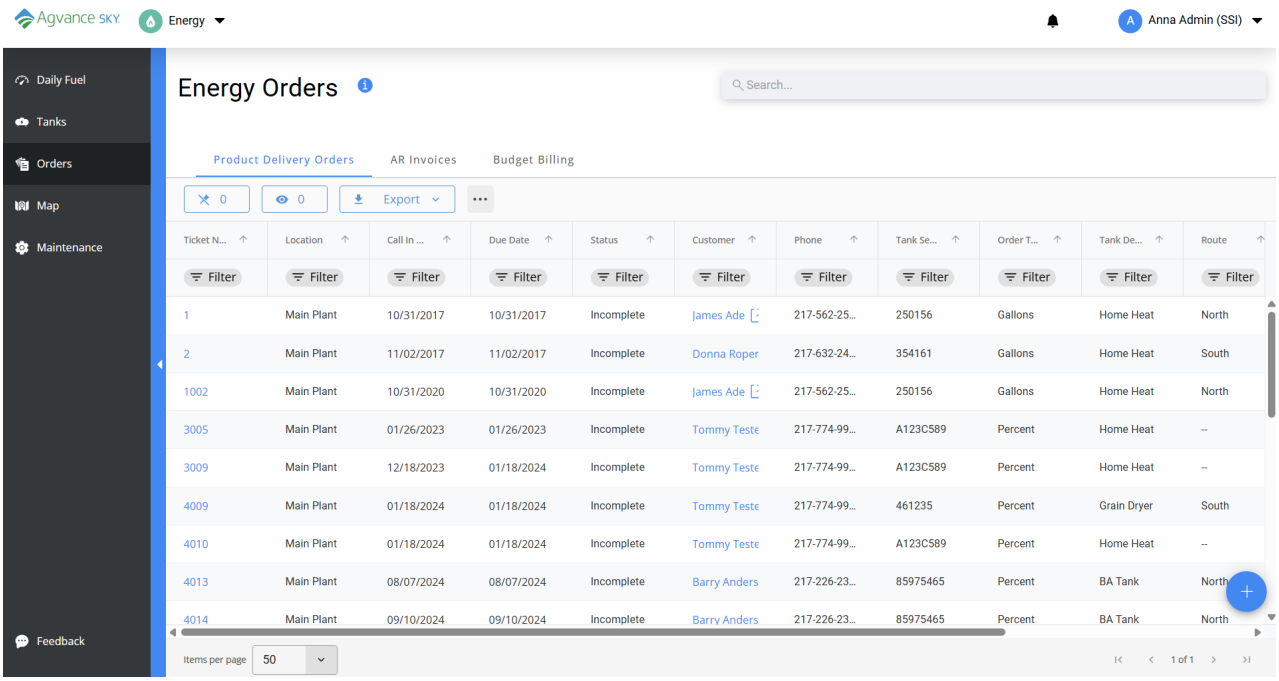
Overview

A listing of all Energy Product Delivery Orders (PDO) is available in SKY Energy. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.



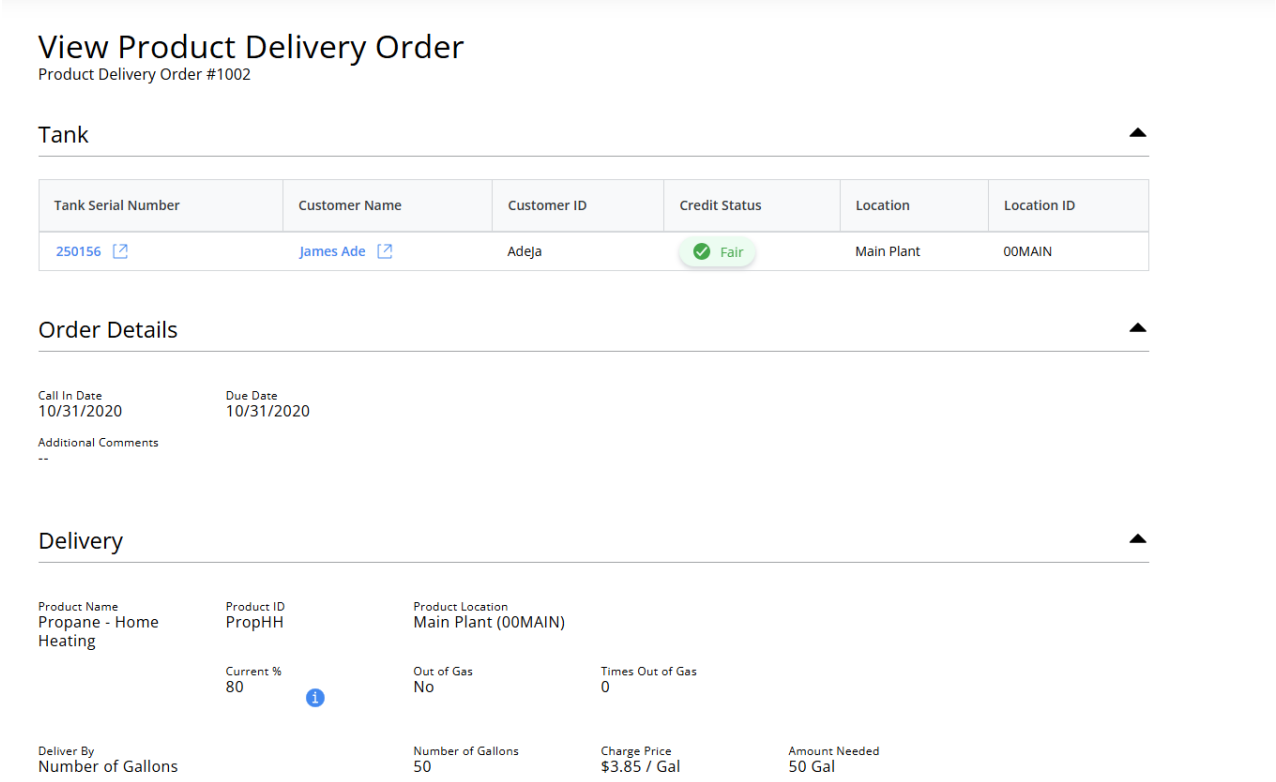
Columns displaying include:

- Ticket Number – Formerly known as *Call In ID*.
- Location
- Call In Date
- Due Date – This column defaults to ascending (oldest date at the top).
- Status – This column defaults to show *Incomplete* first.
- Customer
- Phone
- Tank Serial Number
- Order Type
- Tank Description
- Route
- Region

Note: Any field without data will show a double dash (--).

A full page view of Product Delivery Order information is available by selecting the*Ticket Number* on the *Orders*

grid or from the *Tank History* page.

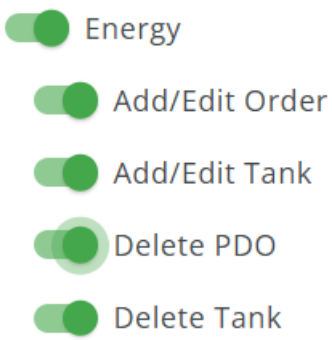


For more information on how to use the *Energy Product Delivery Order* grid see, **Using Grids in Agvance SKY**.

To view more Customer details, select the Customer name link to open that specific Customer's SKY Customer *Overview* page. Read more about the **SKY Customer Overview** page.

Product Delivery Orders

A user permission is required to enable adding or editing a Product Delivery Order within SKY Energy at *SKY Company Admin / User / Edit User*. Toggle on *Add/Edit Order* to add or edit a Product Delivery Order on the Orders page of SKY Energy that has not been invoiced. Invoiced PDO's will always be view only.

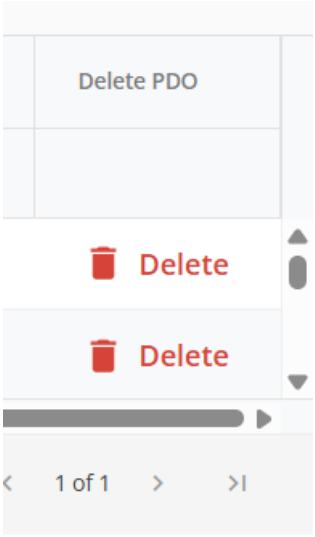


On view of a Product Delivery Order, selecting **Tank Serial Number** opens the selected tank information in a new tab and with access to SKY Customer, selecting **Customer Name** opens the selected customer's SKY Customer page in a new tab.

On the *Add/Edit* view of a *Product Delivery Order*, selecting **Tank Serial Number** opens the selected tank information

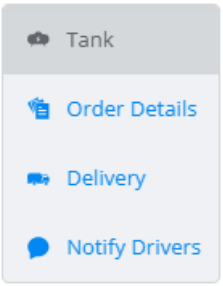
in a new tab, and with access to SKY Customer, **Customer Name** opens the selected customer's SKY Customer page in a new tab. Also, to change or remove the selected tank on a new PDO, select **Remove Tank.** That tank will be removed and the **+ Add Tank** button will be visible again.

Delete Product Delivery Orders from the *Orders* page using the **Delete** action column if incorrect or unneeded. The SKY User permission *Delete PDO* is required to use the Delete option.

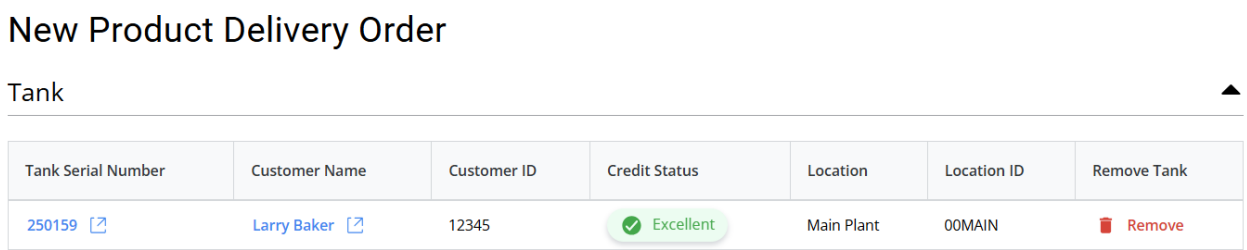


Open SKY *Energy / Orders*, hover over the blue **+** icon, and select **New Product Delivery Order**.

On the *New Product Delivery Order* page, all fields will appear with sections expanded. The left navigation tree expands view upon hovering, and choosing a section will jump to that area of the form.



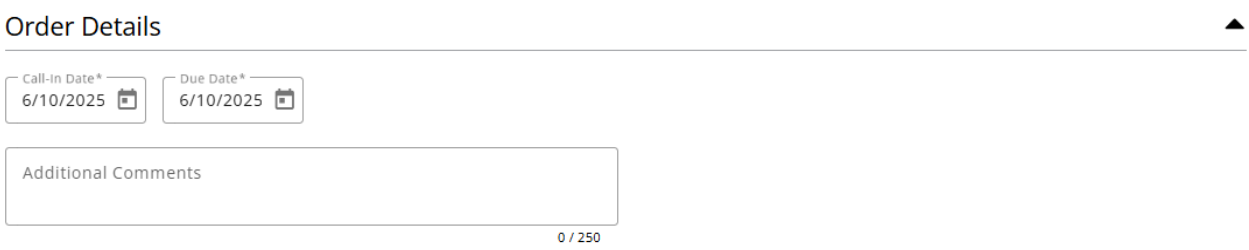
Tank



- Add the Tank to order by selecting **+ Add Tank** to open the search overlay and choose from active tanks. The *Tank Serial Number*, *Customer Name*, *Location*, and *Credit Status* fields will populate upon choosing **Select + Close**.
    - Once the Tank has been added, it can be removed and replaced if needed by selecting **Remove Tank** and choosing **+ Add Tank** to select the replacement.

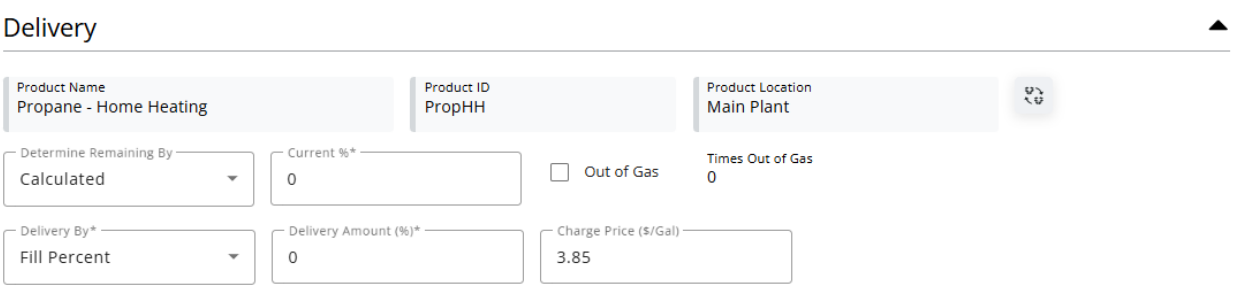
Note: Adding a Tank is required to enter a Product Delivery Order.

Order Details



- **Call-in Date** – Required field that auto fills with the current date.
- **Due Date** – Required field that auto fills with the current date.
- **Additional Comments** – Include comments when creating a PDO for the driver to help with the order once received.

Delivery



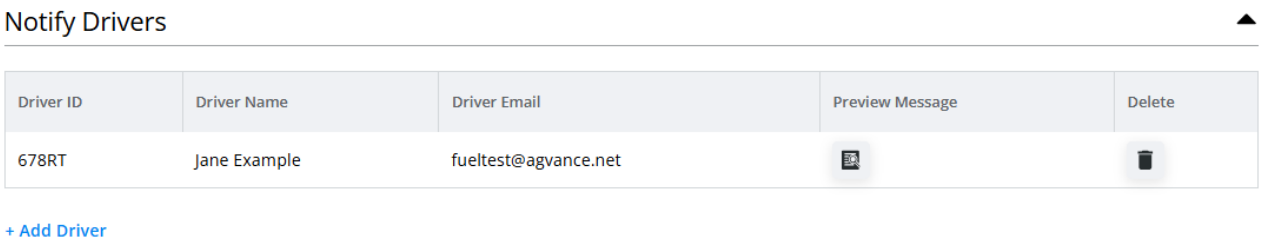
- **Product Name / Product ID / Product Location**
  - If a Tank is not selected, the following message displays: *Select a Tank to manage delivery options.*
  - Once a tank is selected, the *Product Name*, *Product ID*, and *Product Location* attached to the Tank will display. Using the **Change Product** button opens a Product search overlay for a new Product selection.
  - If there is not a Product attached to the Tank, **+ Product** displays and is mandatory to save an Product Delivery Order.
- **Determine Remaining By / Current %**
  - If a tank has a monitor, the *Determine Remaining % By* drop-down will default to *Monitor* with *Current (%)* or optionally choose *Calculated*.
  - If a Tank does not have a monitor, the default is *Calculated* and displays in a read-only state with *Estimated (%)*. *Estimated (%)* will default to values in the database but can be changed.
- **Out of Gas** – Mark the tank on the as *Out of Gas*
  - **Times Out of Gas** – Counts how many times the Tank has previously been out of gas.
- **Delivery By** – Defaults to *Fill Percent* or choose *Number of Gallons* or *Amount of Purchase*.
- **Delivery Amount (%) / Delivery Amount (Gal) / Amount of Purchase ($)**
  - If *Fill Percent* is selected, *Delivery Amount %* displays with an initial value of *0*. This can be changed if needed and has a maximum of three numeric characters.

- If *Number of Gallons* is selected, *Delivery Amount (Gal)* displays with an initial value of *0*. This can be changed if needed and has a maximum of five numeric characters.
- If *Amount of Purchase* is selected, *Amount of Purchase ($)* displays with an initial value of *0*. This can be changed if needed and has a maximum of four numeric characters.

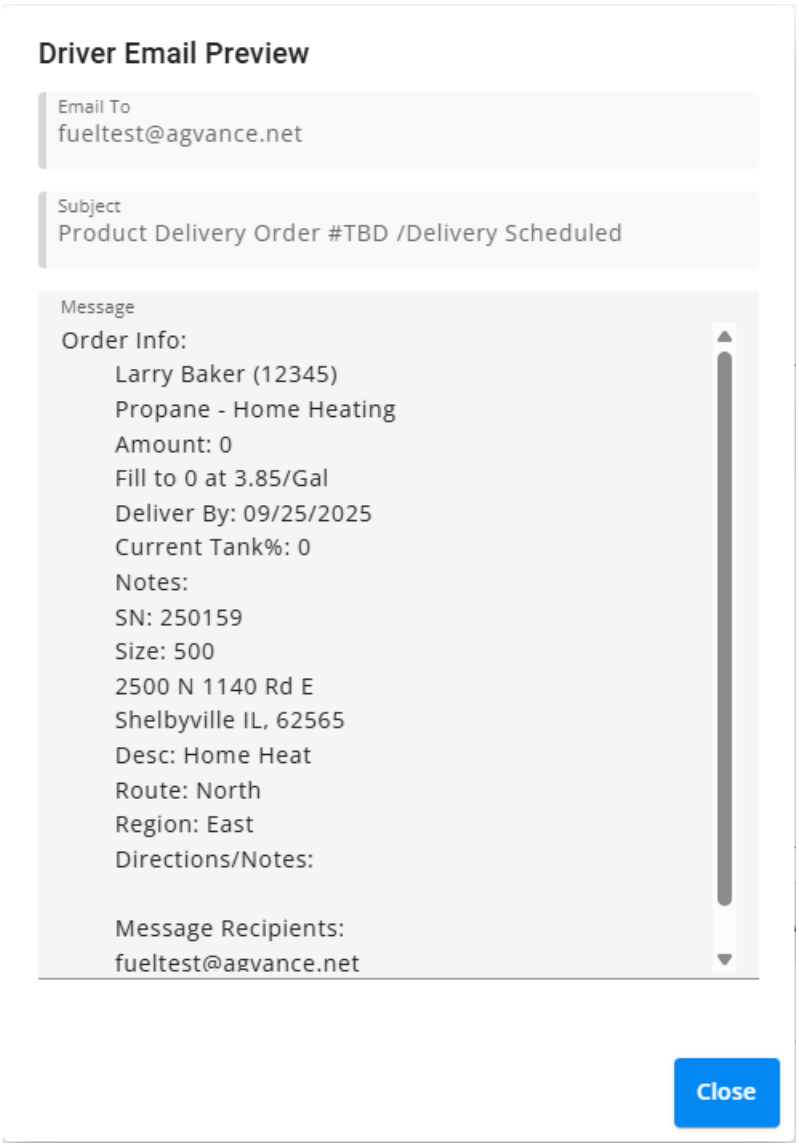
- **Charge Price** – Price charged per gallon.

Notify Driver

Upon saving the PDO, a standard formatted email will be sent to the email associated with that driver. By default, any Drivers already linked to a tank will display. Additional drivers can be selected by choosing the **+ Add Driver** button.



- **Driver ID**
- **Driver Name**
- **Driver Email**
- **Preview Message** –Selecting *Preview Message* will open a dialog showing what the message to the driver will look like.
  - Email from will default to the company's email as the sender.
  - *Email To* will show Drivers email address.
  - *Subject* to read *Product Delivery Order #TBD / Delivery Scheduled*.



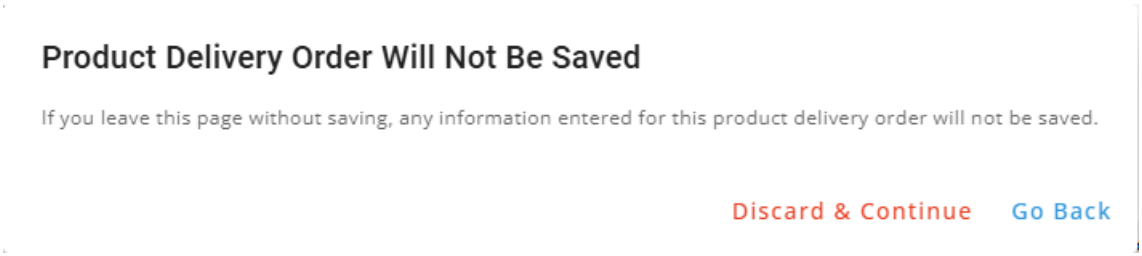
- **Delete** – Removes the selected Driver from receiving notifications.
- **+ Add Driver** – When selected, a Driver search modal displays to choose from a list of active drivers.

Saving or Canceling

Select **Create Order** will save the new Product Delivery Order and route back to the *Orders* list page. A validation banner at the bottom of the screen indicates the order has successfully been saved.

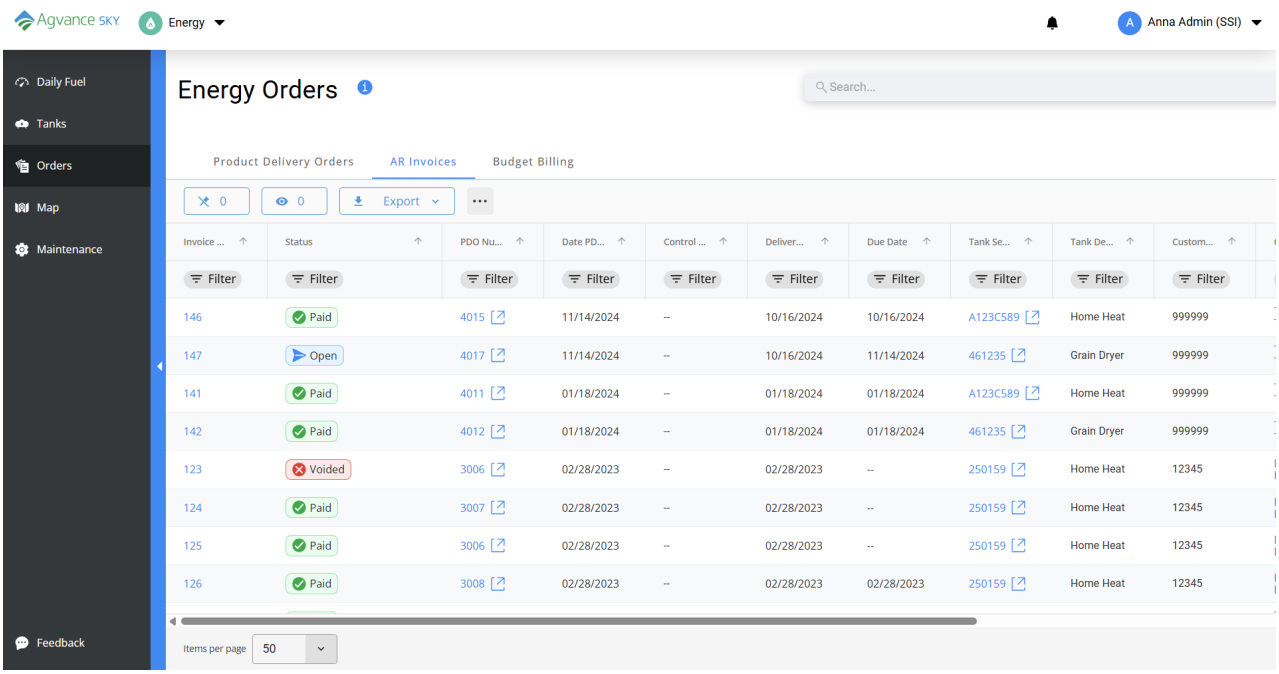
- If any required inputs are empty, the validation banner will display at the top of the page, below the header, calling attention to required inputs.
    - A Tank must be added.
    - *Delivery Amount* (*%* or *Gal*) or *Amount of Purchase* (*$*) must be entered.
    - The validation banner and error state of inputs will display until the user selects **Create Order** after entering required content.

Select **Cancel** to close out and return to the *Orders* screen. If any field was populated, a message displays stating the Tank will not be saved. Select **Discard & Continue** to cancel the Tank or **Go Back** to return to the *Add Product Delivery Order* form.

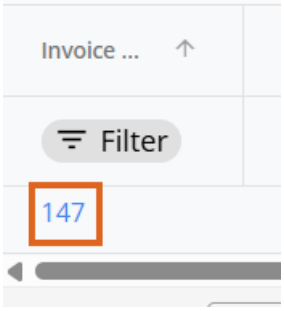


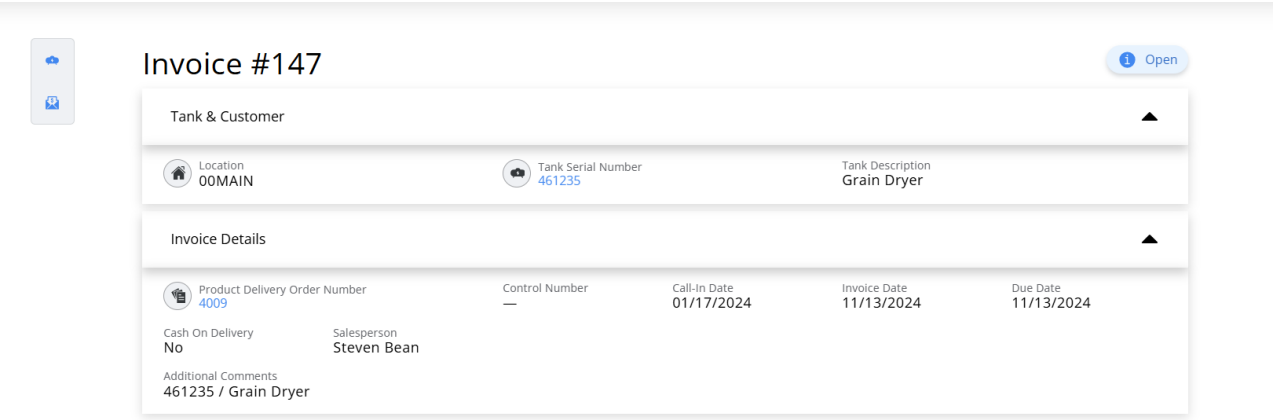
AR Invoices

View a listing of Energy Invoices tied to Product Delivery Orders (PDO) on the *Invoices* tab at *SKY / Energy / Orders*. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

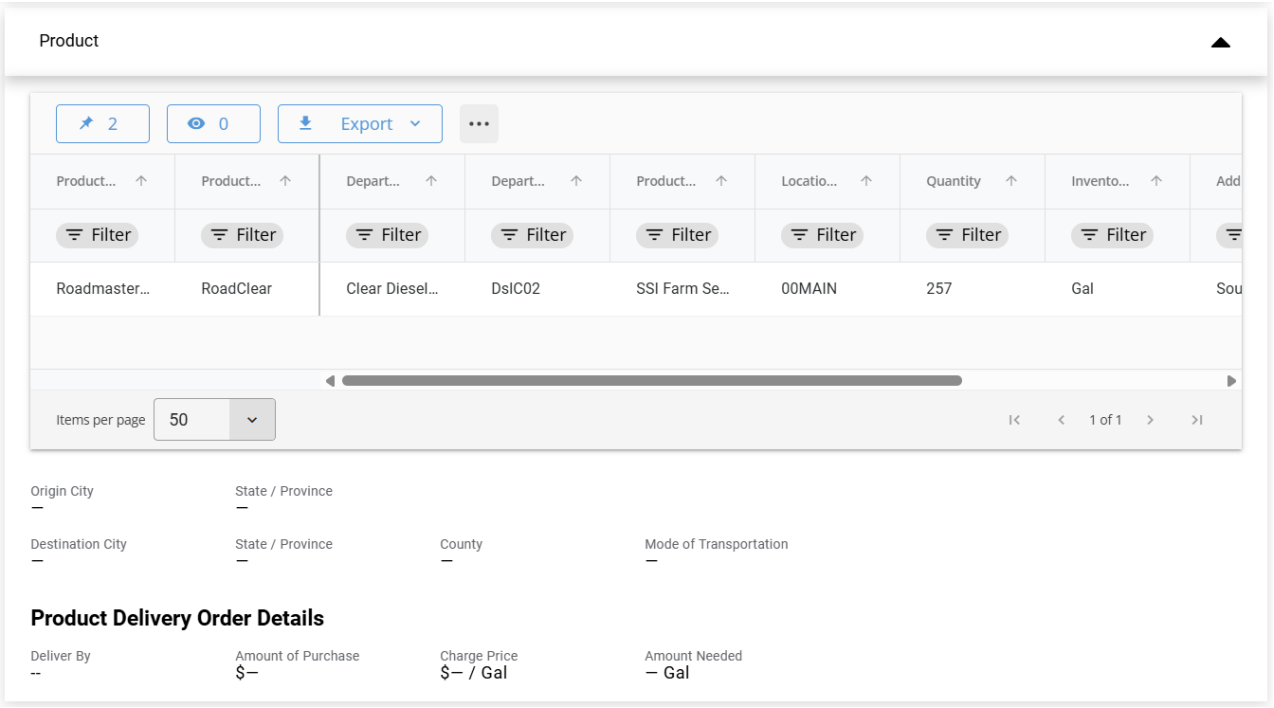


The *Invoice Number* is tied to the Invoice. View more Invoice details by selecting the *Invoice Number* link on any row.



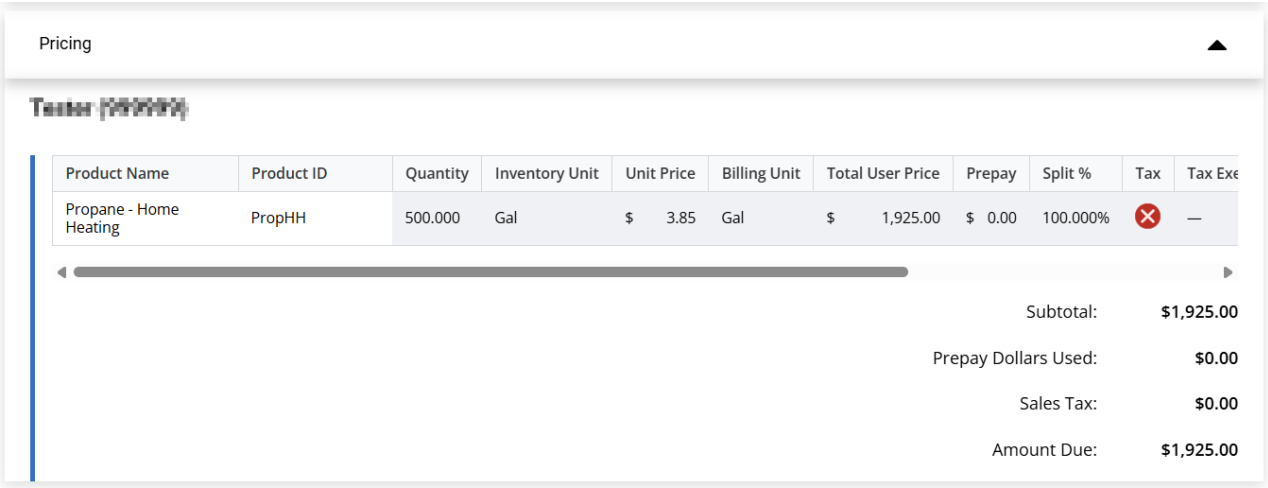


The Invoice opened shows more details including the *Status* (*Open* (Invoiced), *Reversed*, *Voided* and *Paid)*, *Location Name*, *ID* and split information if applicable. The *Tank Serial Number* is tied to PDO/Invoice and when clicked opens a new tab viewing the *Tank Info* page for that specific tank. The *Product Delivery Order Number* opens a new tab to view the relative *Product Deliver Order* page and related information.



Invoices also show Product detail in grid form and additional PDO details below the grid. The list can be narrowed using the **Filter** icon and filter criteria or by typing in the search bar located in the header to populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns.*

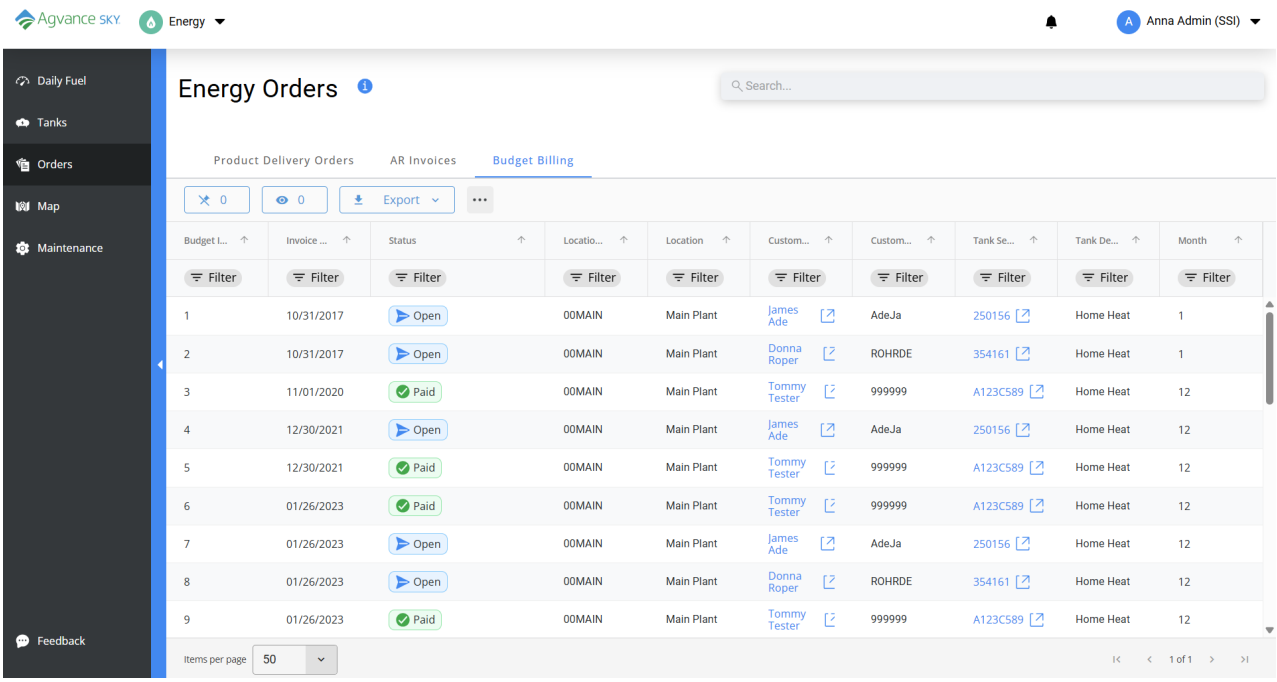
Pricing details display on the Invoice view for review or referencing Energy Invoices.



Note: Any field without data will show a double dash (--).

Budget Billing

The *Budget Billing* tab displays a list view of all Budget Billing customer invoices at *SKY / Energy / Orders*. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

Selecting the **Paid** status from *Budget Billing* tab opens the Customer's *Payments* page in SKY Customer in a new tab.

For all non-budget billing energy invoices see the*AR Invoices* tab.